

**GSG**

# Labor Supply Certification

State of Nevada



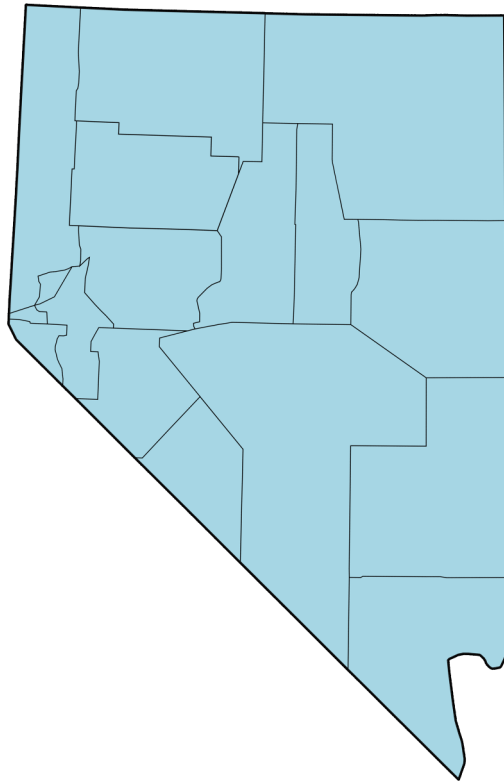
Underemployment

Available Skills

Desired Wages

# State of Nevada Labor Supply Certification

## Partners in Economic Development



*Nevada Governor's Office of*  
**ECONOMIC DEVELOPMENT**

**For Opportunity and Growth**

December 2020



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# Executive Summary

## Introduction

The Nevada Governor's Office of Economic Development (GOED) commissioned a Labor Supply Study to measure the amount and quality of potential employees across all of Nevada's sixteen counties and the independent city of Carson City—the area labor market (ALM). Every county in the state was surveyed and is represented in this study. In order to provide the most accurate and comprehensive analysis of the state's workforce, special attention was placed on ensuring that responses from six distinct cohorts (Males and Females across ages 18-29, 30-54, and 55-64) were collected in every county.

The purpose of this report is to assess the available workforce for the state of Nevada's Area Labor Market. The total available workforce represents those who indicate that they are looking for employment or would consider changing their employment for the right job opportunity. See Appendix B for more detailed discussion of the methodology and data definitions.

## General Findings, Opportunities, and Challenges

This Labor Supply Certification Study demonstrates that Nevada provides a stable and productive workforce that is significantly underutilized. The availability, education, and skills add value and competitiveness to the area labor market. The components of this study quantify the strengths and challenges of this laborforce as well as the impact the COVID-19 pandemic has had on workers in the state.

A subset of the total available workforce of interest to many employers undertaking a large scale hiring effort are those who are identified as underemployed. These individuals are currently working, would take a better job if offered, and they possess the skills, education, and experience to qualify them to do so. Of the 1,514,900 people in the total available workforce, 300,500 are considered underemployed (see more on page 11).

**Total Available  
Workforce  
1,514,900**

**Underemployed  
300,500**

With the right employment opportunities, the Nevada Labor Market appears poised to provide the talent necessary for growth of new and existing businesses representing regional, national, and international markets. Nevada provides advantages such as easy access to both two and four-year education institutions throughout the ALM, a large and diverse workforce talent pool with an easy commute to labor market centers and provides the cost advantages of rural settings coupled with the accessibility of an international destination.

## Workforce Availability Findings

The workforce availability findings reflect the views and perspectives of people between the ages of 18 and 64 who would consider seeking or changing employment. This group represents the supply side of the workforce market. The overall findings are as follows:

- About 52 percent (1,514,900 persons) of the Census Population Estimate in the Overall Nevada ALM is considered to be in the Total Available workforce.
- It is estimated 409,000 workers in the Worker Available subset of the Total Available workforce are willing to change jobs if the right opportunity arises.
- The Non-Worker Available segment of the Total Available workforce is comprised of 64,200 Retired, and 508,500 Not Employed.
- 67 percent of Nevada's Not Employed workforce indicate that they are not working as a direct result of Covid-19.
- Approximately 20 percent of the Total Available workforce are Underemployed (300,500).
- 774,300 people or 51.2 percent of the Total Available workforce would be interested in new or different employment with a wage of up to \$24.99; 26.9 percent would require \$36.00 or more for a new job opportunity.
- The education level of the Total Available workforce includes 64 percent with at least some college education and 94 percent with at least a high school diploma.
- The Total Available workforce is willing to commute an average of 22 miles one way. Of the Total Available workforce, 75.4 percent (1.14 million people) would travel more than 10 miles one way for work while 23.2 percent (352,000) would commute more than 30 miles and 7.4 percent (112,500) would travel more than 50 miles.
- The overall average age of the Total Available workforce is 40. The average age of the Worker Available workforce by occupational cluster is 42 for management, 37 for production/repair/installation, 39 for professional/technical, and 39 for service sector.
- The top motivators for changing jobs among those open for the right opportunities are 70 percent salary, 69 percent Health Benefits, and 43 percent retirement.
- A majority, 91 percent, of the Worker Available workforce stated they are willing to work outside of their primary field of employment (i.e., those in manufacturing would be willing to work in the service sector, etc.).
- The average years on the job for the Overall ALM is 8.6 years which reflects both a stable and mature workforce.
- The Underemployed provide the best opportunity for potential applicants. They represent a subset of the Total Available workforce that is normally more experienced, better educated, and more motivated than the Total Available workforce in general.
- The survey phase utilized multiple methods of soliciting participation including social media, a Spanish version of the survey, reaching out directly to members of the workforce through multiple platforms, and partnering with over 100 community organizations.

## Overview

### Introduction

The primary purpose of the Nevada Labor Supply Study is to determine the number of workers available for employers considering expansions and major investment in the state. The total available workforce represents respondents who indicate they are either looking for employment or would consider changing jobs for the right employment opportunities. The key advantage of a Labor Supply Study is that it provides a more comprehensive view of the pool of potential workers by including workers excluded from the civilian labor force. It also allows researchers to examine those members of the Area Labor Market (ALM) pool who have a propensity to consider a job opportunity given their employment expectations.

The focus of this study is the Nevada ALM. The ALM for the purpose of this study is defined as the area or region from which the labor market draws its commuting workers; Nevada's ALM consists of sixteen counties and the independent city of Carson City. This broad market study provides smaller regions and labor markets the opportunity to analyze their labor supply with a common methodology and database. This report also includes workers who are commuting out of the designated ALM to work but would be willing to work closer to home with the right employment opportunities. The following table provides an overview of the total available workforce including the subset groups from the Worker Available and the Non-Worker Available population within the ALM.

The findings from this survey are based on a type of stratified random marketing and social media campaign of more than 2,200 adults living in the Nevada ALM. The Nevada Governor's Office of Economic Development (GOED) contracted with Growth Services Group (GSG) to design and administer the Labor Supply Study. All adults, whether working or non-working, between the ages of 18 and 64 were considered in this study. In an effort to capture as broad and varied a sampling as possible, GSG conducted the survey phase using multiple methods of soliciting participation including a robust social media campaign, offering a Spanish version of the survey, reaching out directly to members of the workforce through multiple platforms, and partnering with over 100 partner organizations including 44 Chambers, 39 economic development groups, 7 tourism and travel boards, and multiple community colleges, among others. At each step of the process, data validation methods were employed to ensure data integrity and that the sampling accurately reflects the Total Census 18-64 Population as reliably as possible.

When all respondents are included in the analysis, the survey aggregate results have a margin of error as low as 2.1 percent at a 95% confidence level. Further, careful attention has been given to collect sufficient, varied responses such that when all respondents in a single sex or age cohort are aggregated, the results have a margin of error as low as 4.0 percent. Exact margin of error varies by question depending on number of responses and question options; very granular data points such as years of work experience for a single occupation will have a higher margin of error. A more detailed description of the survey process and methodology is presented in Appendix B.

#### Total Available Workforce Overview

Category	Overall	Percent
<b>Total Available Workforce</b>	<b>1,514,900</b>	<b>100%</b>
<b>Worker Available</b>	<b>942,100</b>	<b>62%</b>
Underemployed	300,500	20%
Seeking Different Employment	232,600	15%
Willing to Change	409,000	27%
<b>Non-worker Available</b>	<b>572,700</b>	<b>38%</b>
Not Employed	508,500	34%
Retired	64,200	4%

While all those in the Worker Available workforce are willing to change with the right opportunity, 300,500 are also identified as Underemployed and 232,600 are actively Seeking Different Employment. The remaining 409,000 identified as Willing to Change are willing to change only for the right opportunity.

Among the 572,700 Non-worker Available, all are willing to work with the right opportunity. The Not Employed subset includes both unemployed as defined by BLS (those who are seeking employment) as well as those that are not looking but are willing to accept the right opportunity who are not covered in the BLS definition.



# Available Workforce

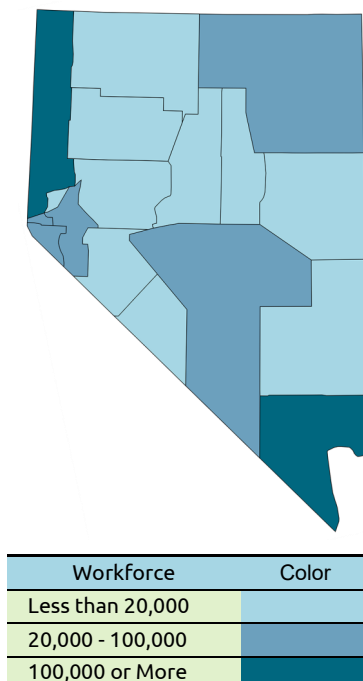
## Total Available Workforce

The following table describes the total available workforce in Nevada's ALM. The total available workforce for Nevada represents 1,514,900 people which consists of 942,100 working and 572,700 non-working. This demonstrates a state-wide workforce that is more than sufficient in scope and diversity to support most employers considering expansion or location in the state's labor markets.

The map shows how each county in the ALM compares to all the other counties in terms of number of the Total Available workforce in the state. Each county is grouped into one of three categories specified in the legend.

The summary table below shows a total available workforce of 1,514,900, 51.8 percent of the estimated Nevada Census Population and 83.7 percent of the estimated Nevada Census 18-64 Population. The table further presents the subsets of Total Available Workforce and Underemployed by sex and age cohorts. Males make up 51.6 percent and females 48.4 percent of the Total Available Workforce. Those in the age 18-29 cohort are more likely to fall in the Underemployed subset compared to those in the age 55-64 cohort; 30-54 are represented at approximately the same rate in Underemployed as in the larger Total Available Workforce at 55 and 56 percent respectively.

**Available Workforce in Nevada by County**



## Available Workforce by Work Status

Work Status	Population	Percent
<b>Total Available Workforce</b>	<b>1,514,900</b>	<b>100%</b>
<b>Worker Available</b>	<b>942,100</b>	<b>62%</b>
Working (Withholdings)	765,500	51%
Self-Employed (No Withholdings)	99,600	7%
Working Student	73,700	5%
Military	3,400	0%
<b>Non-worker Available</b>	<b>572,700</b>	<b>38%</b>
Not Employed	454,300	30%
Retired	64,200	4%
Non-Working Student	54,100	4%

## Summary Workforce Results

Category	Overall	Percent
<b>Population and Civilian Labor Force</b>		
Census Population	2,922,800	100.0%
Census 18-64 Population	1,810,300	100.0%
Census 18-64 Male Population	915,100	50.5%
Census 18-64 Female Population	895,200	49.5%
<b>Total Available Workforce</b>		
Total Available Workforce	1,514,900	100.0%
Male	781,300	51.6%
Female	733,500	48.4%
Age 18-29	404,700	27%
Age 30-54	841,400	56%
Age 55-64	268,800	18%
<b>Underemployed</b>		
Underemployed	300,500	100.0%
Male	156,700	52.1%
Female	143,800	47.9%
Age 18-29	99,800	33%
Age 30-54	165,200	55%
Age 55-64	35,600	12%

Sources: Census and Bureau of Labor Statistics (BLS) Population and Labor Force Estimates

Underemployment is a subset and is included in Total Available Workforce statistics

### Average Age and Years on the Job

The average age and years on the job for the various occupational clusters indicate a mature, experienced, and diverse Available Workforce. The Non-worker Available cohort has a higher average age (42.1) compared to the Total Available Workforce due primarily to Retired Non-workers not actively seeking but available for the right opportunity (9% of Non-Worker Available; Avg. Age of 56.8). The average age for the Total Available Workforce is 40.1.

### Age & Experience by Occupational Cluster

Occupational Cluster	Avg. Age	Years on Job
Management	42.0	10.2
Production/Repair/Installation	36.8	8.6
Professional/Technical	39.3	9.9
Services	38.6	7.5
Non-Worker Available	42.1	-
<b>Total Available Workforce</b>	<b>40.1</b>	<b>8.6</b>

The three oldest occupation groups are: Transportation and Material Moving; Management; and Protective Services. The three youngest occupation groups are: Military; Arts, Design, Entertainment, Sports, and Media; and Production. The average age of the Worker Available workforce across all occupations is 38.8 (7.8% younger than Non-Worker Available).

The top three occupation groups by most years on the job are: Healthcare Practitioners and Technical; Legal; and Architecture and Engineering. The three occupation groups with the least years on the job are: Military; Farming, Fishing, and Forestry; and Community and Social Services.

### Age & Experience by Standard Occupational Classification (SOC)

Occupational Classification	Avg. Age	Years on Job
Architecture and Engineering	40	11
Arts, Design, Entertainment, Sports, and Media	35	9
Building and Grounds Cleaning and Maintenance	36	6
Business and Financial Operations	39	7
Community and Social Service	40	6
Computer and Mathematical	38	10
Construction and Extraction	37	10
Educational Instruction and Library	40	11
Farming, Fishing, and Forestry	39	3
Food Preparation and Serving Related	36	8
Healthcare Practitioners and Technical	39	12
Healthcare Support	37	7
Installation, Maintenance, and Repair	38	10
Legal	40	12
Life, Physical, and Social Science	38	11
Management	42	10
Military Specific	30	2
Office and Administrative Support	39	7
Personal Care and Service	40	9
Production	35	7
Protective Service	41	10
Sales and Related	40	8
Transportation and Material Moving	42	8
<b>Total Worker Available</b>	<b>38.8</b>	<b>8.6</b>

### *Current and Previous/Other Work Experience*

The following table shows the number of workers in the Worker Available workforce aligned with each occupation by Primary or Secondary job as well as those with Underutilized or Unutilized skills. The table provides a perspective on the types of workers available for employment in the Nevada ALM. The first two columns in the table show the number of workers in the Worker Available workforce currently employed in each of the various occupational classifications for their primary or secondary employment respectively. Workers working both a Primary and Secondary job in the same occupational classification are only counted once and are shown in the Primary column.

Underutilized workers are currently working in the associated occupation but report having underutilized knowledge, skills, or abilities within the occupation. Unutilized workers, by contrast, are currently working in a different occupation but report having additional knowledge, skills, or abilities in the associated occupation. Workers must have completed education beyond high school to be included in the Underutilized and/or Unutilized segments.

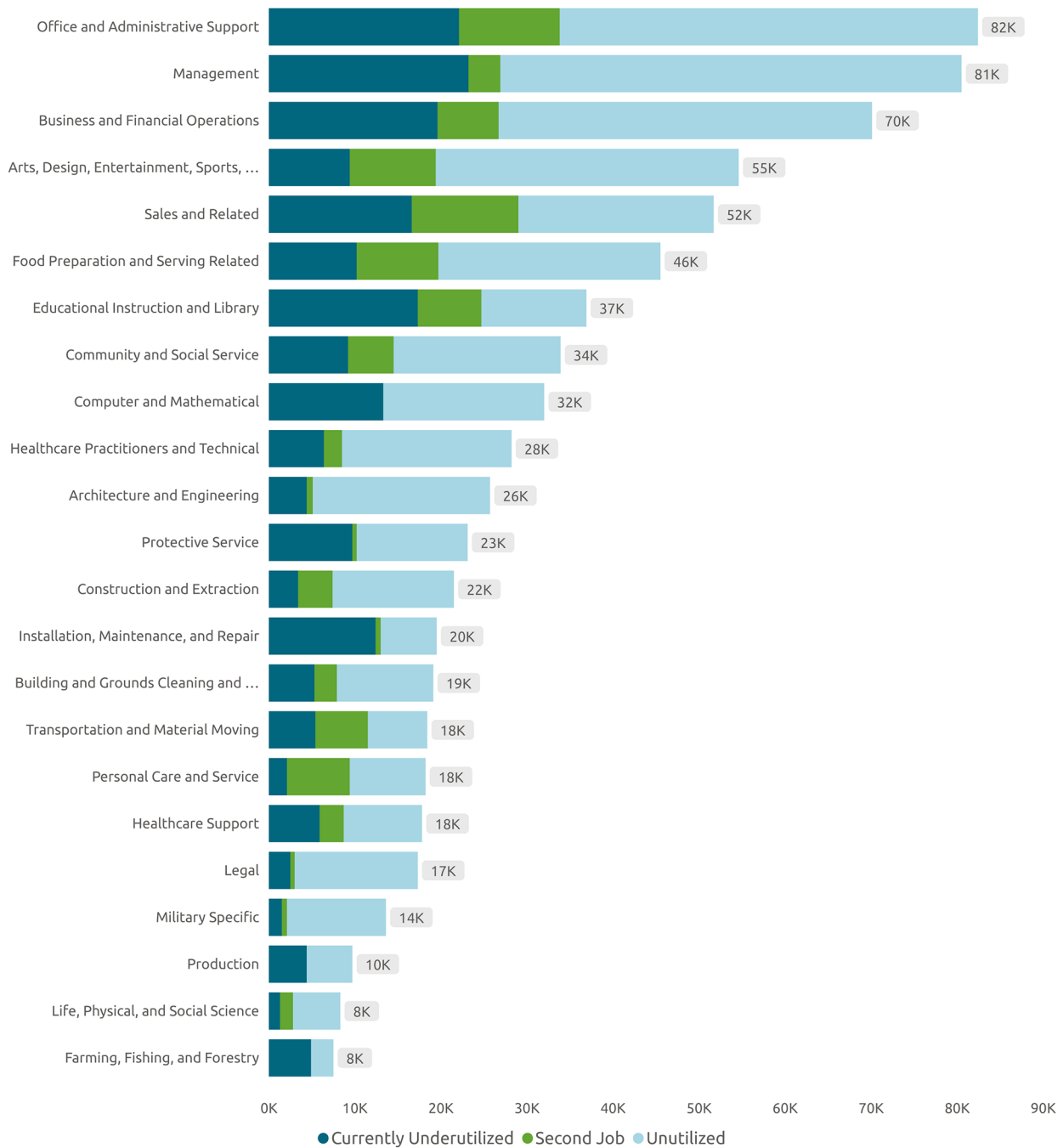
Of those Workers Available 15 percent also have second jobs. 36 percent of workers in Computer and Mathematical report having a second job compared to just 3 percent of workers in Installation, Maintenance, and Repair occupations.

Office and Administrative Support occupations have the largest amount of untapped talent with 33,800 workers working part time in the occupation or currently underutilized with an additional 48,600 workers currently working in other fields but with experience in Office and Administrative Support who are currently looking or would be willing to change for the right opportunity.

#### **Worker Available Work Experience**

Occupational Classification	Primary	Secondary	Underutilized	Unutilized
Architecture and Engineering	19,100	700	4,400	20,600
Arts, Design, Entertainment, Sports, and Media	39,100	10,000	9,400	35,200
Building and Grounds Cleaning and Maintenance	31,900	2,600	5,300	11,200
Business and Financial Operations	80,400	7,100	19,600	43,400
Community and Social Service	43,300	5,300	9,200	19,400
Computer and Mathematical	36,600	-	13,300	18,700
Construction and Extraction	39,600	4,000	3,400	14,100
Educational Instruction and Library	65,500	7,400	17,300	12,200
Farming, Fishing, and Forestry	8,600	-	4,900	2,600
Food Preparation and Serving Related	72,500	9,500	10,200	25,800
Healthcare Practitioners and Technical	28,400	2,100	6,400	19,700
Healthcare Support	25,700	2,800	5,900	9,100
Installation, Maintenance, and Repair	31,800	600	12,400	6,500
Legal	14,900	500	2,500	14,300
Life, Physical, and Social Science	11,100	1,500	1,300	5,500
Management	82,000	3,700	23,200	53,600
Military Specific	2,200	600	1,500	11,500
Office and Administrative Support	110,200	11,700	22,100	48,600
Personal Care and Service	23,300	7,300	2,100	8,800
Production	28,700	-	4,400	5,300
Protective Service	22,900	500	9,700	12,900
Sales and Related	78,400	12,400	16,600	22,700
Transportation and Material Moving	38,500	6,100	5,400	6,900
<b>Total Worker Available</b>	<b>942,100</b>	<b>96,400</b>	<b>210,300</b>	<b>352,900</b>

## Worker Available Work Experience



This chart shows the same information as presented in the table on the previous page but in a graphical format, excluding those workers not underutilized in their primary occupation. The visual shows a good mix of current and related work experience across all occupations. Office and Administrative Support (82k), Management (81k), Business and Financial Operations (70k), Arts, Design, Entertainment, Sports, and Media (55k), and Sales and Related (52k) all represent occupations with significant untapped potential with over fifty thousand workers in each occupation reporting they are underutilized in their primary job, are working in the occupation solely as a second job, or are not working in the occupation but have the ability and willingness to.

## Student Debt

Student debt is a growing concern as is ensuring a well educated workforce; managing the two presents a challenge for our local and national economy. According to CNBC, 44 million people, roughly 70 percent of recent graduates, have an average debt load of \$37,172. It is for this reason that student debt is addressed in this study.

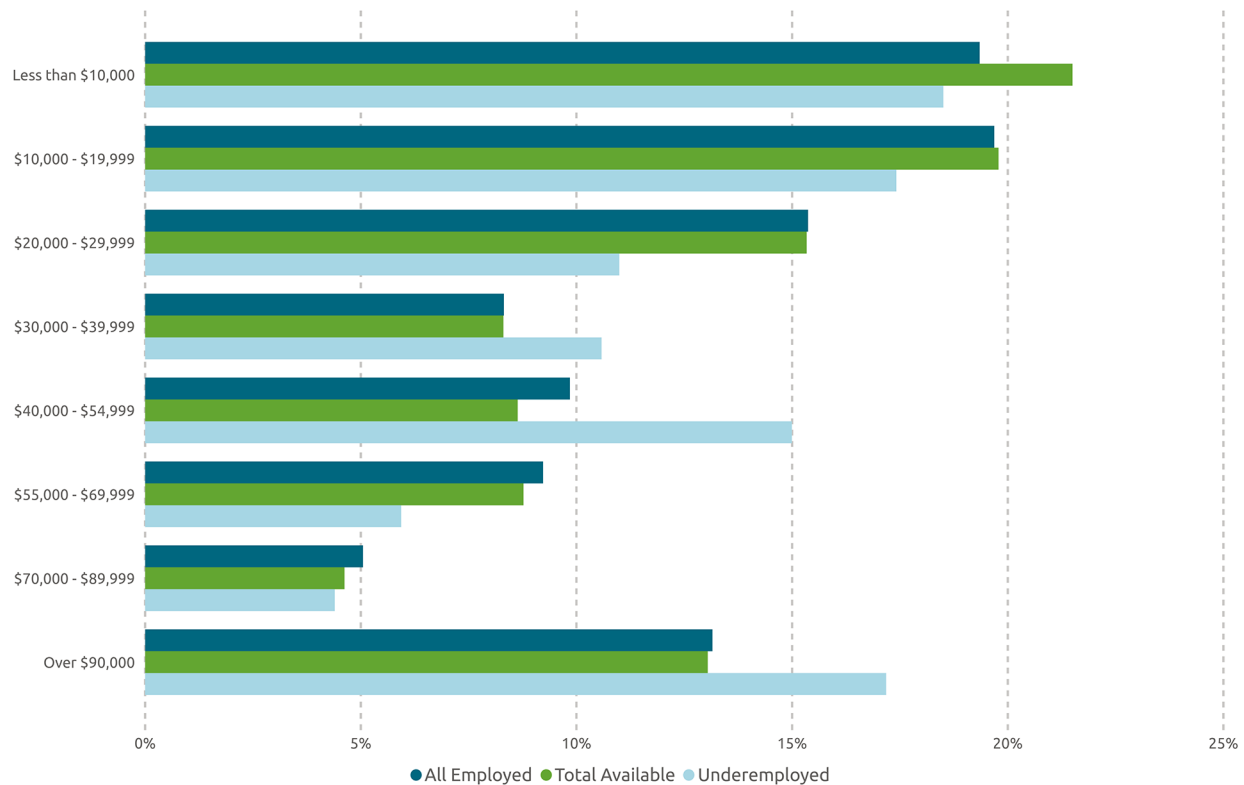
The Underemployed workforce is much more likely (45%) than the rest of the Total Available workforce (20%) to report holding student debt.

### Student Debt by Age Group

	18 - 29	30 - 54	55 - 64
<b>Have Debt</b>	<b>26%</b>	<b>28%</b>	<b>12%</b>
<b>Debt Amount</b>			
Less than \$10,000	31%	17%	25%
\$10,000 - \$19,999	23%	19%	15%
\$20,000 - \$29,999	15%	16%	14%
\$30,000 - \$39,999	9%	8%	7%
\$40,000 - \$54,999	7%	8%	16%
\$55,000 - \$69,999	7%	9%	13%
\$70,000 - \$89,999	2%	6%	5%
Over \$90,000	7%	17%	5%

The data indicate that 26 percent of those 18-29 have student debt. This compares to 28 percent for the 30-54 subset and just 12 percent for those 55-64. The debt amounts for the younger available workforce and oldest available workforce are skewed towards the lower end of the debt balance spectrum where the distribution of debt is much wider for those in the middle age group. Two thirds (65%) of those with Over \$90,000 in debt also report holding an advanced degree.

### Student Debt Current and Total Available Workforce



This chart represents the percentage of each subset of Underemployed, Total Available workforce, and All Employed represented by each student debt range.

\*<https://www.cnbc.com/2018/02/15/heres-how-much-the-average-student-loan-borrower-owes-when-they-graduate.html>

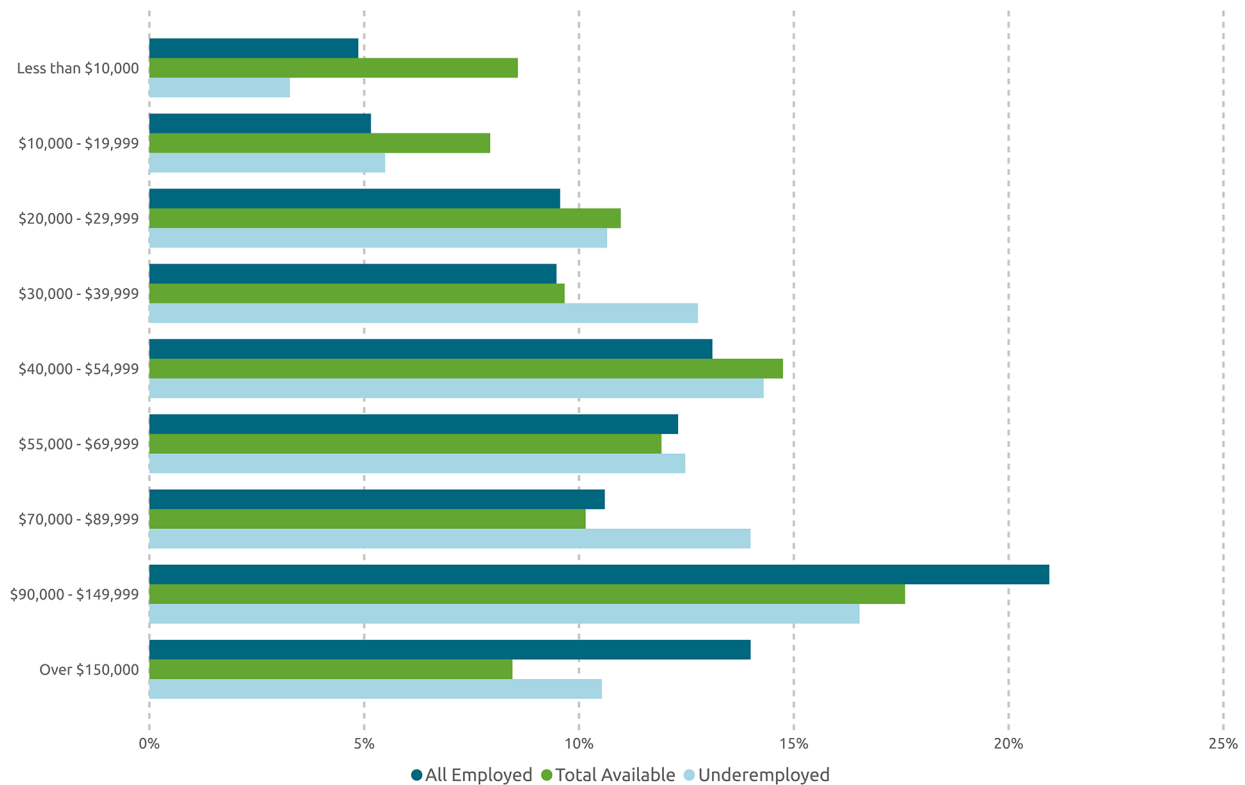
## Household Income

The household income data show the younger 18-29 age group with 45 percent having household income of less than \$30,000 compared to the 30-54 age group's 21 percent and the 55-64 age group's 22 percent. For the 18-29 age group, just 10 percent have a household income over \$90,000, compared to 34 percent of the 30-54 age group and 29 percent of the 55-64 age group.

**Household Income by Age Group**

	18 - 29	30 - 54	55 - 64
Less than \$10,000	15%	6%	7%
\$10,000 - \$19,999	13%	6%	7%
\$20,000 - \$29,999	17%	9%	8%
\$30,000 - \$39,999	12%	9%	9%
\$40,000 - \$54,999	12%	17%	12%
\$55,000 - \$69,999	12%	11%	14%
\$70,000 - \$89,999	10%	9%	14%
\$90,000 - \$149,999	9%	22%	19%
Over \$150,000	1%	12%	10%

**Household Income Current and Total Available Workforce**



This chart represents the percentage of each subset of Underemployed, Total Available workforce, and All Employed represented by each household income range.

## Worker Available Workforce

The willingness of the currently employed to change employment with the right opportunity is a key indicator in profiling the characteristics of the Total Available Workforce in the Area Labor Market. The employed individuals who are willing to change jobs with an existing or different employer represent the primary pool of the Total Available Workforce. The results of this

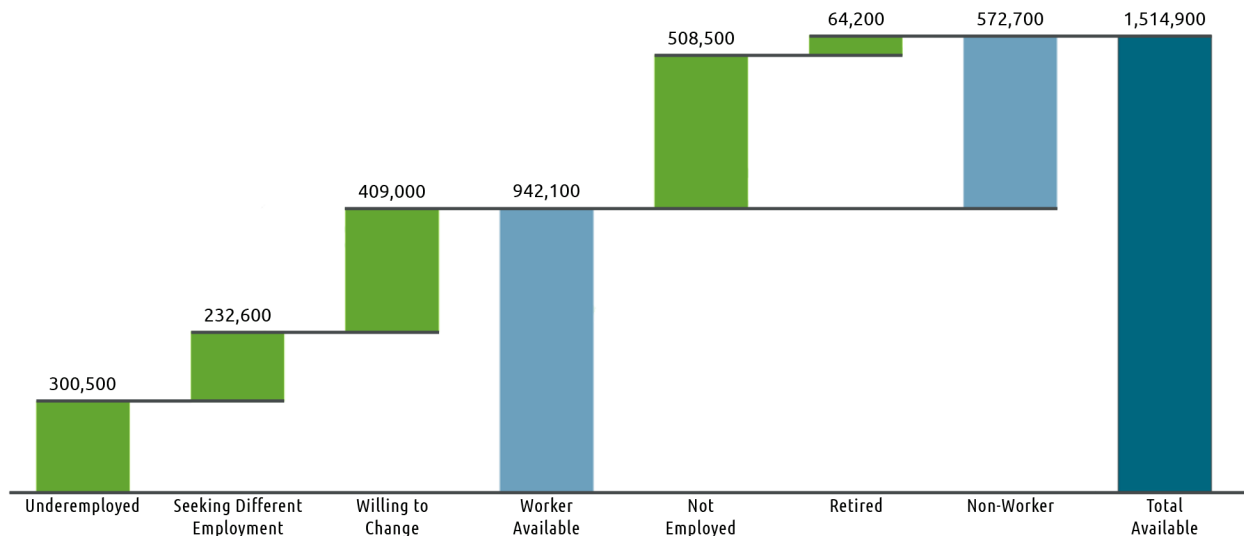
workforce survey show that 84 percent of respondents identified themselves as part of the Total Available Workforce. Among the Total Available Workforce, 62 percent are working at the time they were contacted and are included in Worker Available with the other 38 percent included in Non-Worker Available.

It is important to analyze each segment of respondents to identify and respect the differences and contributions to the ALM. Many factors must be considered when evaluating these workers, such as education, unused skills, wages and benefits desired, past experience, and the distance individuals are willing to travel to work. Within the Worker Available workforce are three subsets: those who are classified as Underemployed, those actively Seeking Different Employment, and those Willing to Change with the right opportunity. Respondents of these three subsets are counted only once as part of the Worker Available workforce.

### Worker Available Breakout

Workforce Subset	Overall	Percent
<b>Total Available</b>	<b>1,514,900</b>	<b>100%</b>
<b>Worker Available</b>	<b>942,100</b>	<b>62%</b>
Underemployed	300,500	20%
Seeking Different Employment	232,600	15%
Willing to Change	409,000	27%

### Worker Available Population



This “waterfall” chart shows the proportion of each subset in the Worker Available and Non-Worker Available cohorts; additionally, the proportion of Worker Available and Non-Worker Available as subsets of Total Available are shown. This visualization aids in understanding the relative size of each subset of the Total Available workforce. Underemployed, Seeking Different Employment, and Willing to Change are discussed in detail on the following pages.

## Underemployed

The subset of underemployment is identified as those who believe they are currently underutilized in their jobs. This group is a primary source of good employees as these individuals are now working but desire a better job and also possess the skills, education, and experience to qualify for better jobs. They report to have additional education and/or job training; a previous job that required more skill and/or education; or a current job that does not require the level of training and/or education attained. The key to this definition is education, training, and/or experience. Current pay or part-time status alone is not a qualifying factor for underemployment status in this study. In addition, only those who have had some post-high school education are reported in the Underemployed subset.

The 300,500 in this group are included in the 942,100 members of the Worker Available workforce. Comparing this page and the two following, one can compare similarities and differences between the Underemployed, Seeking Different Employment, and Willing to Change subsets.

### Age and Sex

The average age of this group is 38.2 years of age. The respondents are distributed among all age ranges: 18 to 29 (33%), 30 to 54 (55%), and 55 to 64 (12%). Males and females represent 52.1 percent and 47.9 percent respectively.

### Education and Training

Fifty-one percent of the **Underemployed** respondents in the ALM have a Post-Secondary Certificate/Credential, Some College, or an Associate's degree, 30 percent hold a Bachelor's degree, and the remaining 19 percent have an advanced degree. This compares to 71 percent of the **Total Available Workforce** with post-high school education.

31 percent of the Underemployed indicated that access to Experience, Training, and Education is one of the top factors in accepting a new job. A higher salary is the most important factor (78%) followed closely by Health Benefits (71%).

### Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing, Government/Education, Services—Gaming, and Services—Non-Gaming. While occupations may be similar in different industries, the focus of the work and work culture often varies significantly among different industries. 55 percent of the Underemployed are in the Services sectors.

## Workforce Characteristics

Workforce Characteristics	
Underemployed	300,500
Years on Job	7.3
Willing to Commute One Way	24.5
Current Average Wage	\$26.00
Desired Average Wage	\$32.60
Household Income	\$72,700
Average Age	38.2
Male/Female Ratio	52.1/47.9
Working Multiple Jobs	21%
Only Job Part Time or Temporary	16%
Have Health Insurance	91%
Access to Employer Health Insurance	73%
Access to Employer Retirement Benefit	51%

## Education Attainment

Education Attainment	
Less than high school	0%
High school or equivalent	0%
Post-Secondary Certificate/Credential	12%
Some college or associate's degree	39%
Bachelor's degree	30%
Advanced degree	19%

By definition, those in the Underemployed subset must have some education beyond high school.

## Primary Industry Sector

Primary Industry Sector	
Goods Producing	17%
Government/Education	28%
Services—Gaming	17%
Services—Non-Gaming	38%



### Seeking Different Employment

The subset of Seeking Different Employment is identified as those who are actively looking to change jobs, are currently employed, but are not found to be Underemployed. The 232,600 in this group are included in the 942,100 Worker Available group and are not counted twice. Compared to the Underemployed on the preceding page and the Willing to Change on the following page, the Seeking Different Employment have less years on the job, lower current and desired wages, lower household income, lower access to health insurance through an employer or otherwise, a lower average age, and less than half currently have an employer sponsored retirement benefit.

#### Age and Sex

The mean age of this group is 36.1 years of age. The respondents are distributed among all age ranges: 18 to 29 (37%), 30 to 54 (55%), and 55 to 64 (9%). Males and females are more evenly represented than in other subsets (51.2/48.8).

#### Education and Training

Less than half (49%) of the subset have post high school education and 29 percent have four-year degrees or higher. The Seeking Different Employment subset has the lowest education attainment level of all worker groups with 49 percent possessing some post-high school education compared to 76 percent of the Total Available Workforce.

Twenty-eight percent of the Seeking Different Employment respondents stated that flexible work hours would be an important consideration in accepting a new job. Health Care is the most important benefit for this group (72%) followed by salary (62%) when considering new employment.

#### Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing, Government/Education, Services—Gaming, and Services—Non-Gaming. While occupations may be similar in different industries, the focus of the work and work culture often varies significantly among different industries. 63 percent of those Seeking Different Employment are in the Services sectors.

### **Workforce Characteristics**

Seeking Different Employment	232,600
Years on Job	6.8
Willing to Commute One Way	22.0
Current Average Wage	\$23.10
Desired Average Wage	\$26.40
Household Income	\$58,800
Average Age	36.1
Male/Female Ratio	51.2/48.8
Working Multiple Jobs	13%
Only Job Part Time or Temporary	30%
Have Health Insurance	76%
Access to Employer Health Insurance	63%
Access to Employer Retirement Benefit	45%

### **Education Attainment**

Less than high school	5%
High school or equivalent	46%
Post-Secondary Certificate/Credential	4%
Some college or associate's degree	15%
Bachelor's degree	16%
Advanced degree	13%

### **Primary Industry Sector**

Goods Producing	23%
Government/Education	14%
Services—Gaming	14%
Services—Non-Gaming	49%

## *Willing to Change*

The Worker Available workforce in Nevada as determined in this study is 942,100. Those Willing to Change number 409,000. See the following tables for more characteristics of this group.

### Age and Sex

The mean age of this group is 40.7 years. The respondents are distributed among all age ranges: 18 to 29 (23%), 30 to 54 (59%), and 55 to 64 (18%). Males are significantly over represented at 56.7 percent compared to females who make up just 43.3 percent of those willing to accept different employment.

### Education and Training

Seventy-four percent of the Willing to Change respondents in the ALM have some post high school education and 42 percent possess four-year degrees or higher. The Willing to Change subset has a slightly higher proportion of workers with an advanced degree—19.5 percent compared to 17.8 percent in the Total Available Workforce.

28 percent of the Willing to Change respondents stated that experience, training, and educational opportunities would be an important consideration in accepting a new job. Salary (70%) and Health Care (69%) are the most important benefits for this group when considering new employment.

### Work Experience and Environment

To gain perspective on the types of workers available for new or different employment, survey respondents were asked to classify their occupations and industry experience as Goods Producing, Government/Education, Services—Gaming, and Services—Non-Gaming. While occupations may be similar in different industries, the focus of the work and work culture often varies significantly among different industries. 56 percent of those Willing to Change are in the Services sectors.

## **Workforce Characteristics**

Willing to Change	409,000
Years on Job	10.6
Willing to Commute One Way	25.2
Current Average Wage	\$32.90
Desired Average Wage	\$40.20
Household Income	\$86,000
Average Age	40.7
Male/Female Ratio	56.7/43.3
Working Multiple Jobs	11%
Only Job Part Time or Temporary	14%
Have Health Insurance	86%
Access to Employer Health Insurance	72%
Access to Employer Retirement Benefit	59%

## **Education Attainment**

Less than high school	5%
High school or equivalent	22%
Post-Secondary Certificate/Credential	5%
Some college or associate's degree	27%
Bachelor's degree	22%
Advanced degree	19%

## **Primary Industry Sector**

Goods Producing	19%
Government/Education	25%
Services—Gaming	14%
Services—Non-Gaming	42%

## Non-Worker Available Workforce

Relying solely on the unemployed workforce as determined by the Bureau of Labor Statistics (BLS) overlooks sources of potential labor like stay-at-home parents and retirees who would be willing to enter or reenter the workforce if the right opportunity arose. This study uses Non-Worker which includes two subsets: Not Employed and Retired.

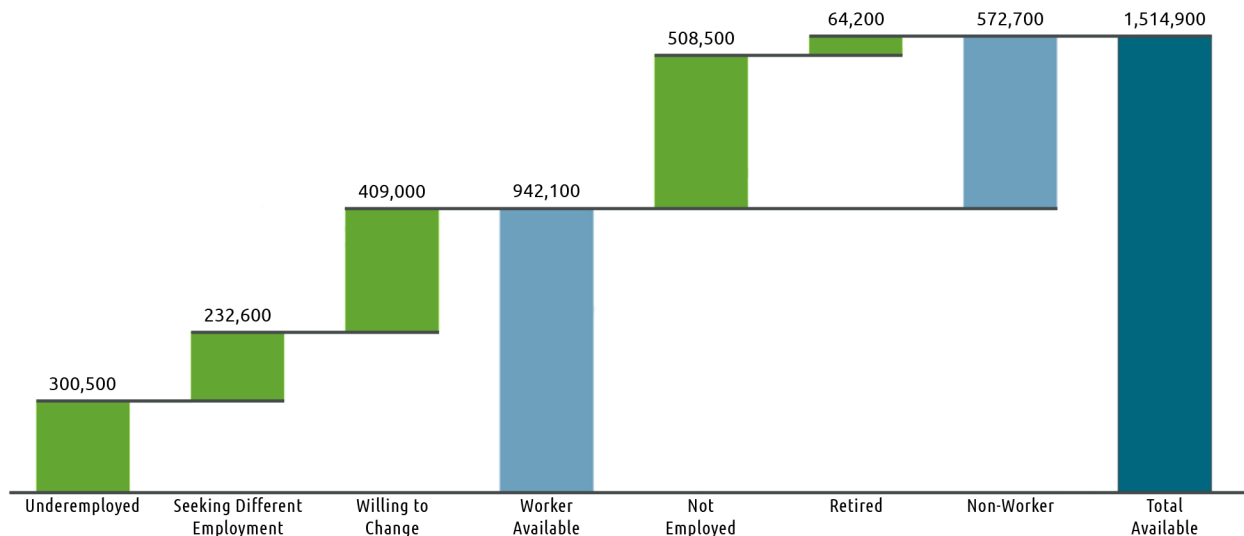
**Non-Worker Available Breakout**

Workforce Subset	Overall	Percent
<b>Total Available</b>	<b>1,514,900</b>	<b>100%</b>
<b>Non-Worker Available</b>	<b>572,700</b>	<b>38%</b>
Not Employed	508,500	34%
Retired	64,200	4%

Including these subsets in the analysis provides a more accurate assessment of the potential workforce in the area. Of the respondents surveyed, 36 percent stated they were Non-Working. By questioning these respondents about seeking employment or their willingness to accept an employment offer, the survey identified a population of approximately 572,700 who would enter the workforce for the right opportunity.

Analyzing the subsets exposes unique characteristics for better understanding the Non-Worker Available workforce. A further distinction in the non-working group are those actively seeking employment and those not actively seeking employment but willing to work or accept employment with the right opportunity includes wages, benefits, work culture, transportation, childcare, scheduling, etc.. The following sections provide a profile of the Not Employed and Retired subsets.

**Non-Worker Available Population**



This “waterfall” chart shows the proportion of each subset in the Worker Available and Non-Worker Available cohorts; additionally, the proportion of Worker Available and Non-Worker Available as subsets of Total Available are shown. This visualization aids in understanding the relative size of each subset of the Total Available workforce. Not Employed and Retired are discussed in detail on the following pages.

## Not Employed

Of those who responded who are Not Employed, 73 percent are actively seeking employment. It is estimated that 138,100 are willing to return to work only if presented with the right opportunity. The following table provides the general characteristics of this subdivision.

### Age and Sex

The average age of this group is 40.3 years of age. The respondents are distributed among all age ranges: 18 to 29 (25%), 30 to 54 (58%), and 55 to 64 (18%). Males make up 46.8 percent and females 53.2 percent seeking or willing to accept employment.

### Education and Training

Sixty percent of the Not Employed respondents in the ALM have some post-high school education. In comparing the Not Employed subset to other subsets, the Not Employed tend to be some of the least educated with only 52 percent having some college compared to the Total Available Workforce population at 64 percent and only 4 percent possessing an advanced degree compared to the Total Available Workforce average of 14 percent.

### Reason Not Employed

Of those who identified themselves as Not Employed (508,500), 54 percent stated that it was due to a major layoff or workplace closing. A full two thirds of those in this subset attribute their Non-Worker status to the Covid-19 pandemic.

### Reason Can't Find Job

Of those responding about not finding a job, 65 percent state job availability as a primary factor preventing them from finding work. 17 percent cited children being home due to virtual schooling as a top barrier to gaining employment—another significant impact of the Covid-19 pandemic.

## Workforce Characteristics

Not Employed	508,500
Seeking Employment	370,400
Willing to Commute One Way	19.5
Desired Average Wage	\$23.30
Household Income	\$50,600
Average Age	40.3
Male/Female Ratio	46.8/53.2
Have Health Insurance	68%

## Education Attainment

Less than high school	12%
High school or equivalent	28%
Post-Secondary Certificate/Credential	8%
Some college or associate's degree	31%
Bachelor's degree	17%
Advanced degree	4%

## Reason Not Employed

<b>Direct Result of Covid-19 Pandemic</b>	<b>67%</b>
<b>Primary Reason</b>	
Major Layoff or Workplace Closing	54%
Never Employed	8%
Fired/Released	7%
Disabled	6%
Other Income/Pension	5%
Other/Prefer Not to Say	21%

## Primary Factors Preventing Employment

Job Availability	65%
Lack Necessary Skills	22%
Children Home due to Virtual Schooling	17%
Not Interested/Other	16%
Lack Industry Certification/Credential	16%
Lack College Degree	16%
Transportation	12%
Lack of High School Diploma	11%
Child Care	10%
Compatibility/Personality	6%

Multi-select options, percentages will not total to 100%

### Retired

Of those who indicated they are Retired, it is estimated that 50,400 are willing to enter or return to work only if presented with the right opportunity; just 22 percent are actively seeking employment. The following table further segments the overall Nevada ALM into age, sex, and education areas.

### Age and Sex

The mean age of this group is 56.2 years of age. 76 percent of the respondents belong to the 55 to 64 age range, 22 percent to the 30 to 54 group, and 2 percent in the 18 to 29 range. Those respondents outside of the 55 to 64 group who indicated they are retired stated disability and other/pension income as the reason for their retirement status. Males make up 55.4 percent and females 44.6 percent of the Retired subset.

### Education and Training

Ninety-one percent of Retired respondents in the ALM have some post-high school education with 39 percent possessing four-year degrees or higher.

Comparing retirees to the other subsets shows the retirees have a higher level of education with 82 percent having some college compared to the Total Available Workforce at 64 percent. This group represents a significant pool of experienced and educated workers but also higher opportunity costs to draw them back in the labor market.

The most important benefit for those in the Retired group was flexible hours, given by 59 percent of respondents.

### **Workforce Characteristics**

Retired	64,200
Seeking Employment	13,800
Willing to Commute One Way	20.0
Desired Average Wage	\$26.60
Household Income	\$71,800
Average Age	56.2
Male/Female Ratio	55.4/44.6
Have Health Insurance	92%

### **Education Attainment**

Less than high school	0%
High school or equivalent	9%
Post-Secondary Certificate/Credential	9%
Some college or associate's degree	42%
Bachelor's degree	14%
Advanced degree	25%

## Desired Wages and Benefits

Salary, health and retirement benefits rank high among all subsets in the Total Available Workforce when making an opportunity assessment for potential employment. While wage and benefit costs are important for employers when assessing a workforce market, of equal or greater importance is the quality and availability of the necessary skills and talent of the labor force. The greater the quality and availability of the skills and talent for increased productivity, the more likely higher wages and benefits will follow. Competitiveness in the global economy means producing goods and services competitive in price and quality in the market place.

### Desired Benefits

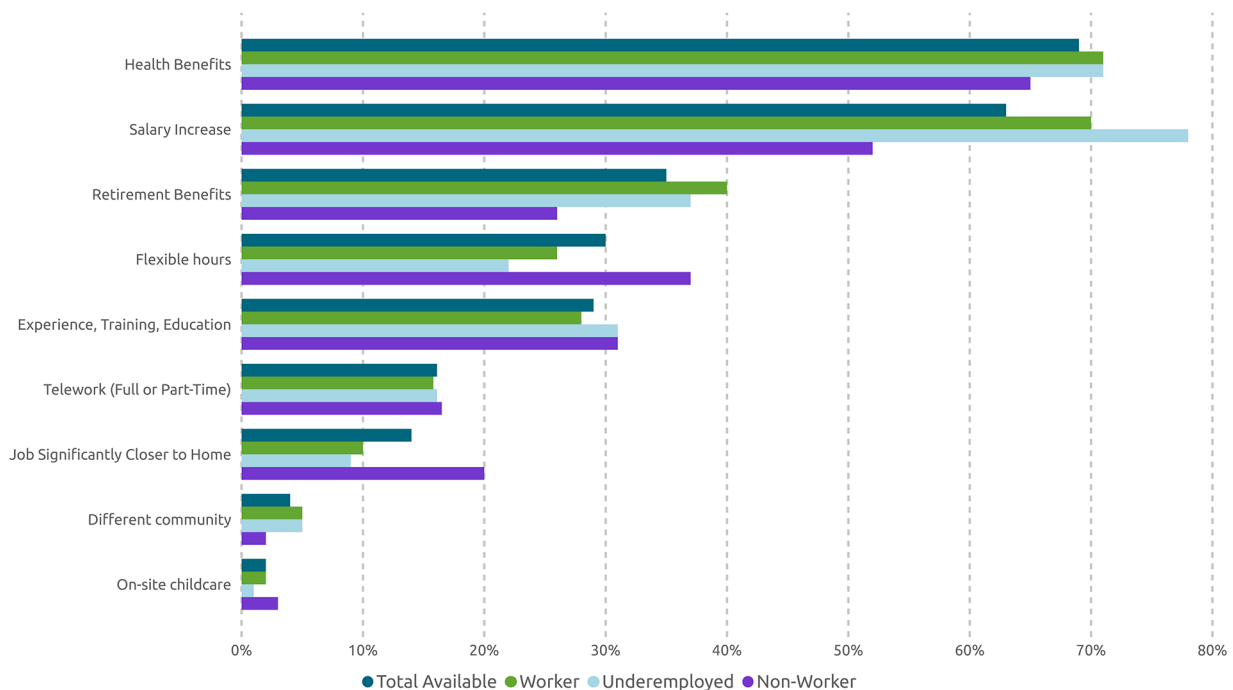
Salary and health benefits were the top two motivators for changing jobs among all subsets except Retired who ranked flexible hours first. Retirement benefits, flexible hours, and access to Experience, Training, and Education follow and present an opportunity for employers to differentiate themselves. The work-life benefits (flexible hours, full or part-time telework, on-site childcare, and/or job significantly closer to home) ranked much higher among Non-Worker Available (60 percent of respondents selected at least one) than other subsets and particularly when compared to the Underemployed (40%).

**Desired Benefits by Subset**

Desired Employer Benefit	Total Available	Worker	Under-employed	Non-Worker
Health Benefits	69%	71%	71%	65%
Salary Increase	63%	70%	78%	52%
Retirement Benefits	35%	40%	37%	26%
Flexible hours	30%	26%	22%	37%
Experience, Training, Education	29%	28%	31%	31%
Telework (Full or Part-Time)	16%	16%	16%	16%
Job Significantly Closer to Home	14%	10%	9%	20%
Different community	4%	5%	5%	2%
On-site childcare	2%	2%	1%	3%

\*Multi-select options, percentages will not total to 100%

**Available Workforce Desired Benefits**



## Desired Wage Rate Ranges

All wage and salary requirements expressed by respondents are presented in hourly rates. Appendix A presents an easy conversion table to annual, monthly, or weekly rates. 4.3 percent of the Total Available Workforce would be interested in employment with a wage of up to \$11.99 per hour. It is estimated that 774,300 people or 51.2 percent of the Total Available workforce would be interested in new or different employment with a wage of up to \$24.99; 26.9 percent would require \$36.00 or more for a new job opportunity.

### Total Available Workforce

Subset	Workforce	Average Desired Wage
<b>Total Available</b>	<b>1,514,900</b>	<b>\$30.20</b>
<b>Worker Available</b>	<b>942,100</b>	<b>\$34.40</b>
Underemployed	300,500	\$32.60
Seeking Different Employment	232,600	\$26.40
Willing to Change	409,000	\$40.20
<b>Non-worker Available</b>	<b>572,700</b>	<b>\$23.70</b>
Not Employed	508,500	\$23.30
Retired	64,200	\$26.60

By comparing desired wage rate ranges by subset, the various preferences are more evident. Those that currently hold jobs (Worker Available) report a desired wage in a new position more than 45 percent higher than that of the Non-Worker Available workforce.

As of July 1, 2020, Nevada's minimum wage is \$9.00 per hour (\$8.00 per hour for employers that offer qualifying health insurance benefits). Nevada's minimum wage is scheduled to increase to \$12.00 per hour over the next four years, increasing by \$0.75 each July through 2024. This represents a 33 percent increase over four years from the \$9.00 minimum wage at the time of this study. These scheduled increases will compress the desired wage ranges presented in this study, as 4.3 percent of respondents indicated a desired wage that is lower than the expected 2024 minimum. Members of the Total Available workforce in other desired wage ranges will also likely have higher desired wages in the future, relative to the increases to the state's minimum wage.

### Desired Wage Rate by Available Workforce Subset

	Total		Worker		Underemployed		Non-Worker	
	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent	Available Workforce	Percent
\$11.99 or Less	65,500	4%	22,200	2%	8,200	3%	43,300	8%
\$12.00 - \$13.99	88,200	6%	38,300	4%	10,400	3%	50,000	9%
\$14.00 - \$15.99	223,900	15%	96,700	10%	27,500	9%	127,300	22%
\$16.00 - \$17.99	78,200	5%	40,700	4%	18,600	6%	37,500	7%
\$18.00 - \$19.99	86,000	6%	41,500	4%	11,400	4%	44,600	8%
\$20.00 - \$23.99	179,700	12%	107,000	11%	31,700	11%	72,700	13%
\$24.00 - \$27.99	160,200	11%	86,900	9%	32,600	11%	73,300	13%
\$28.00 - \$31.99	144,700	10%	108,800	12%	41,000	14%	35,900	6%
\$32.00 - \$35.99	81,100	5%	58,900	6%	15,700	5%	22,200	4%
\$36.00 - \$39.99	87,800	6%	66,500	7%	21,100	7%	21,300	4%
\$40.00 - \$49.99	126,100	8%	112,000	12%	37,000	12%	14,100	2%
\$50.00 or More	193,300	13%	162,800	17%	45,300	15%	30,500	5%
<b>Total:</b>	<b>1,514,900</b>	<b>100%</b>	<b>942,100</b>	<b>100%</b>	<b>300,500</b>	<b>100%</b>	<b>572,700</b>	<b>100%</b>



## Desired Wage Rate By Industry and Occupation

The Government/Education industry sector has the highest desired wage of \$39.30 with the Services-Gaming having the lowest at \$26.70. The management occupation group has the highest desired wage at \$48.10 and those in the Non-Working workforce have the lowest at \$23.70.

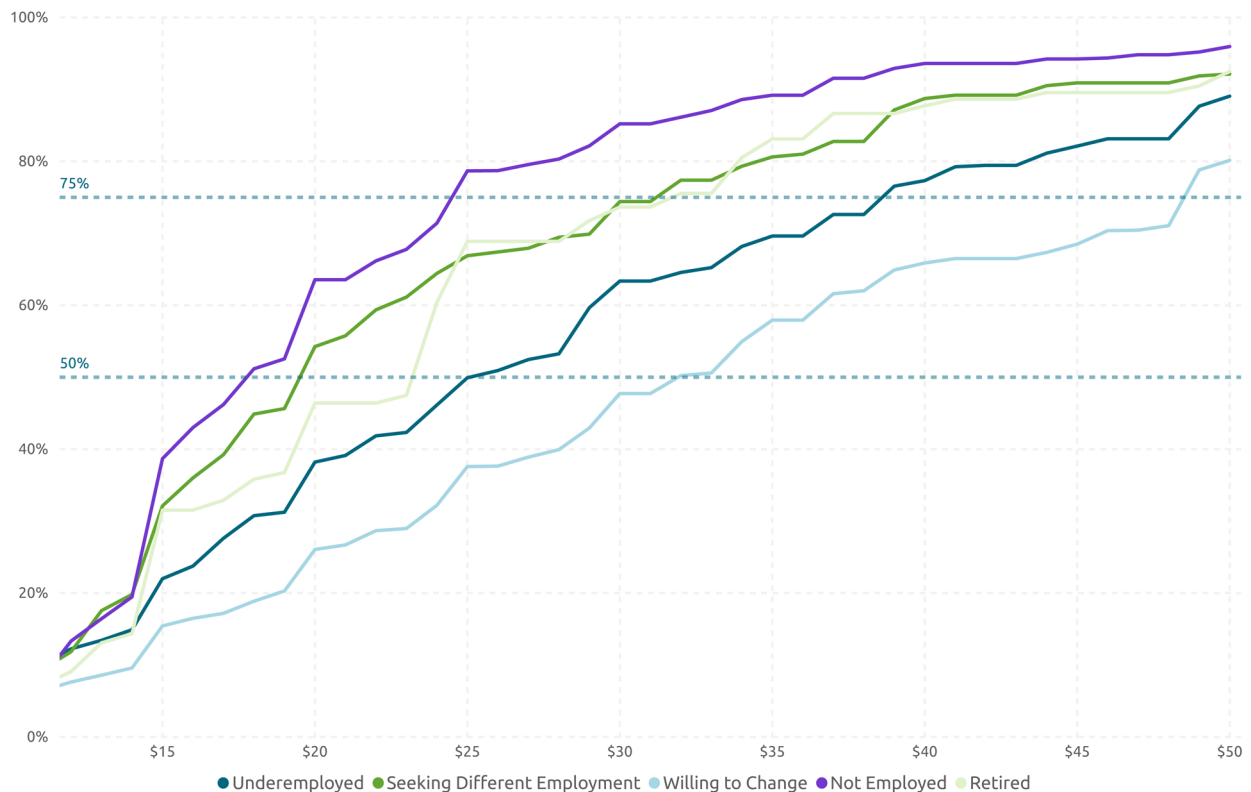
### Desired Wage Rate by Industry

Goods Producing	\$38.20
Government/Education	\$39.30
Services—Gaming	\$26.70
Services—Non-Gaming	\$32.70

### Desired Wage Rate by Occupation

Management	\$48.10
Production/Repair/Installation	\$30.30
Professional/Technical	\$42.30
Services	\$27.80
Non-Worker Available	\$23.70

### Desired Wage Rate by Percent of Available Workforce



The higher the wage (x axis), the higher the percentage of the population that would take that wage (y axis). About 50 percent of the Worker Available workforce would be satisfied with \$23.00 an hour or less and about 75% of the population would be satisfied with \$35.00 an hour or less.



## Occupation Current and Desired Wages

The following table provides a detailed analysis of the Total Available workforce by occupation, average current wage, and average desired wage. Comparing the current average wage with the desired wage shows the expectations of the Worker Available workforce in accepting a new job. The Production/Repair/Installation occupation clusters indicate the lowest desired wage increase (16.5%) compared to the Worker Available workforce (21.6%); those in the Professional/Technical occupation clusters have the highest desired wage increase (24.4%).

The three occupation groups: Legal; Architecture and Engineering; and Computer and Mathematical all report a disparity of more than \$9.00 between their current and desired wages. Additionally, the three occupation groups: Legal; Personal Care and Service; and Food Preparation and Serving Related all report a desired increase of over 30 percent. These groups are likely to be motivated by new opportunities with higher salaries.

**Occupation Current and Desired Wages**

	Available Workforce	Average Current Wage	Average Desired Wage	Desired Increase
<b>Management</b>	<b>76,800</b>	<b>\$39.70</b>	<b>\$48.10</b>	<b>21.2%</b>
Management	76,800	\$39.70	\$48.10	21%
<b>Production/Repair/Installation</b>	<b>145,300</b>	<b>\$26.00</b>	<b>\$30.30</b>	<b>16.5%</b>
Building and Grounds Cleaning and Maintenance	33,800	\$21.60	\$25.30	17%
Construction and Extraction	40,000	\$31.20	\$35.80	15%
Installation, Maintenance, and Repair	36,600	\$27.00	\$31.00	15%
Production	34,900	\$22.80	\$27.30	20%
<b>Professional/Technical</b>	<b>293,200</b>	<b>\$34.00</b>	<b>\$42.30</b>	<b>24.4%</b>
Architecture and Engineering	19,900	\$40.20	\$51.70	29%
Business and Financial Operations	79,800	\$34.30	\$42.40	24%
Computer and Mathematical	38,000	\$41.10	\$50.20	22%
Educational Instruction and Library	70,400	\$32.10	\$38.50	20%
Healthcare Practitioners and Technical	25,800	\$36.70	\$45.60	24%
Legal	16,700	\$30.70	\$44.90	46%
Life, Physical, and Social Science	11,500	\$35.40	\$42.70	21%
Military Specific	2,300	\$31.20	\$34.90	12%
Protective Service	28,900	\$24.50	\$31.50	29%
<b>Services</b>	<b>426,800</b>	<b>\$23.00</b>	<b>\$27.80</b>	<b>20.9%</b>
Arts, Design, Entertainment, Sports, and Media	37,600	\$28.60	\$33.30	16%
Community and Social Service	39,500	\$29.70	\$35.00	18%
Farming, Fishing, and Forestry	9,900	\$23.70	\$29.90	26%
Food Preparation and Serving Related	74,200	\$15.60	\$20.60	32%
Healthcare Support	28,300	\$25.30	\$31.10	23%
Office and Administrative Support	108,300	\$20.70	\$24.20	17%
Personal Care and Service	20,700	\$16.70	\$23.00	38%
Sales and Related	68,900	\$29.20	\$34.50	18%
Transportation and Material Moving	39,400	\$21.60	\$26.20	21%
<b>Non-Worker Available</b>	<b>572,700</b>	<b>N/A</b>	<b>\$23.70</b>	<b>N/A</b>
Non-Worker Available	572,700	N/A	\$23.70	N/A

## Commuting Patterns and Career Preferences

The preferred commute of the Worker Available workforce in the Area Labor Market is 24.2 miles one way. The overall commute preference of the Total Available workforce is 22.4 miles one way. In general, the Total Available workforce indicates it is open to commuting for the right employment opportunity and the table shows 1.14 million people or 75.4 percent of the Total Available workforce would commute more than 10 miles each way for work. It also shows that 352,000 people or 23.2 percent of the Total Available workforce are willing to travel more than 30 miles and 112,500 people, 7.4 percent, will commute more than 50 miles.

### Willingness To Commute By Available Workforce Groups

Where individuals live within the ALM will influence their desire to commute to work. The transportation routes and options to employment centers also have a big influence over where people work. Individuals from communities surrounding larger cities seeking job opportunities and competitive wages/benefits understand the fact that they will have to commute some distance to a new employer. This is evidenced by the 48.8 percent of the Total Available workforce residing outside the major employment hubs of the state who indicate they are willing to commute more than 30 miles, compared to just 20.8 percent of those living within the major employment hubs willing to commute the same distance.

The Preferred Commute by Subset table illustrates the different commuting preferences of those who are employed as well as those not employed. Those who are employed (Worker Available) show a willingness to commute 22.0-25.2 miles each way to work. The Non-Worker Available subset shows a lower willingness to travel, 19.6 miles for the group.

The Non-Worker Available prefer a shorter commute but also are more open to part-time and more flexible work arrangements. In general, Retired workers are not as willing to commute long distances to work; however, those in the ALM are willing to travel 19.5 miles for the right employment opportunities.

There are 15,400 workers in the Worker Available workforce that work exclusively outside the state of Nevada. Of this number, 48.8 percent are identified as Willing to Change, 41.5 percent as Underemployed, and the remaining 9.8 percent are Seeking Different Employment.

82 percent of the Total Available workforce use a personal vehicle as their primary mode of transportation. The second most common mode, public transit, is more often the primary mode for the Non-Worker Available (11.1%) than the Worker Available (4.7%).

#### Preferred Commute by Distance

Distance	Workforce	Percent
Less than 10 miles	373,000	25%
10 - 30 miles	789,900	52%
31 - 50 miles	239,500	16%
51+ miles	112,500	7%

#### Preferred Commute by Subset

Subset	Distance
<b>Total Available</b>	<b>22.4</b>
<b>Worker Available</b>	<b>24.2</b>
Underemployed	24.5
Seeking Different Employment	22.0
Willing to Change	25.2
<b>Non-Worker Available</b>	<b>19.6</b>
Not Employed	19.5
Retired	20.0

#### Preferred Commute by Occupation

Group	Distance
Management	27.3
Production/Repair/Installation	27.7
Professional/Technical	24.2
Services	22.4
Non-Worker Available	19.6
Overall Average	22.4

#### Preferred Commute by Industry

Industry	Distance
Goods Producing	28.6
Government/Education	23.2
Services—Gaming	25.8
Services—Non-Gaming	22.2

## Worker Primary Interest

There are four broad categories of interest when working: people, data, things, and ideas. Most people have preference for one, but the majority of workers are adaptable to all four. A primary interest in one of the four may be an indicator of success in certain occupations. A stronger interest in people or ideas may lead to occupations in management and services. An interest in working with things may point to occupations in Production. Professional/Technical may require a stronger interest in data and analytical skills. The survey results for Nevada show interest in People with 41 percent, Things with 21 percent, Data with 21 percent, and Ideas with 18 percent.

**Primary Work Interest by Available Workforce Subset**

	People		Things		Data		Ideas	
	Workforce	Percent	Workforce	Percent	Workforce	Percent	Workforce	Percent
<b>Total Available</b>	<b>614,200</b>	<b>41%</b>	<b>320,800</b>	<b>21%</b>	<b>311,800</b>	<b>21%</b>	<b>267,900</b>	<b>18%</b>
<b>Worker Available</b>	<b>381,100</b>	<b>25%</b>	<b>181,500</b>	<b>12%</b>	<b>198,500</b>	<b>14%</b>	<b>181,000</b>	<b>12%</b>
Underemployed	115,700	8%	63,600	4%	68,900	5%	52,300	3%
Seeking Different Employment	97,600	6%	40,300	3%	55,600	4%	39,100	3%
Willing to Change	167,800	11%	77,600	5%	74,000	5%	89,600	6%
<b>Non-Worker Available</b>	<b>233,100</b>	<b>16%</b>	<b>139,300</b>	<b>9%</b>	<b>113,300</b>	<b>7%</b>	<b>86,900</b>	<b>6%</b>
Not Employed	208,700	14%	125,800	8%	97,900	6%	76,100	5%
Retired	24,400	2%	13,500	1%	15,400	1%	10,800	1%

## Changing Primary Employment Field

It is usually easier to change from one major industry group to another than it is from one primary occupation field to another. While skills and occupation may be similar in the different industry groups, individual worker's attitudinal characteristics, sometimes known as soft skills, may be more important to workers and employers where the focus is on people and customer service vs. systems and process. There may also be differences in wages and benefits and other work-related characteristics between industry types.

For many individuals, changing jobs to another employment field may not be something they are willing to do. The adaptability and flexibility of the workforce is important in the creation of new jobs and may require job training and other types of programs where jobs disappear because of competition, technology, or global pandemic. If a large percentage of those employed and non-employed are unwilling to change their occupations or job positions, it could limit the type of employer who can enter the area labor market.

The table to the right shows that the Total Available workforce in the Nevada ALM is willing to change their occupations or job positions for the right opportunity. The willingness of each subset of the Total Available workforce is provided.

**Willing To Change Primary Occupation or Industry**

Subset	Available Workforce	Willing To Change Occupation	Willing To Change Industry
<b>Total Available</b>	<b>1,514,900</b>	<b>1,383,100 91%</b>	<b>1,376,900 91%</b>
<b>Worker Available</b>	<b>942,100</b>	<b>839,200 89%</b>	<b>858,600 91%</b>
Underemployed	300,500	280,500 93%	277,000 92%
Seeking Different Employment	232,600	211,100 91%	218,500 94%
Willing To Change	409,000	347,500 85%	363,100 89%
<b>Non-Worker Available</b>	<b>572,700</b>	<b>543,900 95%</b>	<b>518,300 90%</b>
Not Employed	508,500	484,300 95%	459,200 90%
Retired	64,200	59,700 93%	59,100 92%

# Covid-19 Pandemic Impact

## Workforce Impact

67 percent of Nevada's Not Employed subset of the Non-Worker Available workforce indicate that they are not working as a direct result of Covid-19. Among those, just 25 percent believe they will be able to return to their previous employer. 17 percent of the Not Employed workforce ranked Children Home due to Virtual Schooling as one of the primary factors preventing them from finding a job.

### Teleworking

Workers reported that 24 percent of employers added or expanded telework options as a result of Covid-19. Further, 18 percent of workers report that they began teleworking as a result of the pandemic and 34 percent of them expect to continue teleworking after the pandemic. These new teleworkers join the 6 percent of the workforce that reports teleworking prior to the pandemic to make a combined 12 percent of the post-pandemic workforce that expects to telework.

### Income Changes

In light of Covid-19, 56.0 percent of the total workforce expect their household income to significantly decrease or decrease; another third (32.7%) of the workforce expects their income to remain flat in 2020; and just 11.3 percent expect their household income to increase.

### Job Loss

Of the 646,200 members of the Non-Worker workforce (whether Available or not), 352,800 (55%) are identified as currently not employed as a direct result of Covid-19. The majority (81%) of these 352,800 cite a major layoff, workplace closing, or other termination as the specific reason for not being employed.

In addition to significantly changing the workplace environment, the Covid-19 pandemic has changed the home life of much of the workforce. This study finds that 96,100 members of the workforce are unable to work due, at least in part, to children being home for virtual schooling.

### Telework Options

Telework Changes	
Added	14%
Expand	9%
Remained the Same	3%
Not Offered	74%

### Telework Adoption

Telework Status	
Already Teleworked	6%
Began Teleworking and Will Continue	6%
Began Teleworking but Will Return to Office	12%
Do Not Telework	76%

### Expected Income Change

Significantly Decrease	29%
Decrease	27%
Stay the Same	33%
Increase	9%
Significantly Increase	2%

## Health Insurance Coverage

The Worker Unavailable subset indicates the highest overall level of health insurance coverage (94%), indicating a strong correlation between worker satisfaction and availability of health insurance coverage. Conversely, the Seeking Different Employment subset reported the lowest levels of coverage (76%) among all worker groups.

Workers are also increasingly placing an emphasis on health insurance as a desired benefit. 69% of the Total Available Workforce indicated that health insurance was one of their top considerations when seeking new employment opportunities. Among those who did not rank health benefits as a top consideration for employment, 58 percent currently receive health insurance from a source other than their employer such as a family member's plan.

### Health Insurance Coverage

Workforce Subset	Population	% With Health Insurance
<b>Total Census 18-64 Population</b>	<b>1,810,300</b>	<b>81%</b>
<b>Available Workforce</b>	<b>1,514,900</b>	<b>80%</b>
<b>Worker Available</b>	<b>942,100</b>	<b>85%</b>
<i>Underemployed</i>	<i>300,500</i>	<i>91%</i>
<i>Seeking Different Employment</i>	<i>232,600</i>	<i>76%</i>
<i>Willing to Change</i>	<i>409,000</i>	<i>86%</i>
<b>Non-worker Available</b>	<b>572,700</b>	<b>70%</b>
<i>Not Employed</i>	<i>508,500</i>	<i>68%</i>
<i>Retired</i>	<i>64,200</i>	<i>92%</i>
<b>Unavailable Workforce</b>	<b>295,500</b>	<b>89%</b>
<b>Worker Unavailable</b>	<b>222,000</b>	<b>94%</b>
<b>Non-Worker Unavailable</b>	<b>73,400</b>	<b>76%</b>

### Health Insurance Source

<b>Insured</b>	<b>81%</b>
Employer Plan	44%
Family Member's Plan	15%
Government (Medicaid/Medicare)	16%
Nevada Health Link or Healthcare.gov	6%
<b>Uninsured</b>	<b>19%</b>
No Access to Plan	14%
Do Not Want	4%

## Conclusion

This study assesses the supply side of labor and provides information for the state of Nevada's Area Labor Market about commuting patterns, current and desired wages, worker occupation and industry, experience, and education. The Total Available workforce is determined from the Workers and Non-Workers perspective and provides information for the supply side of labor markets. The demand side is determined from the employer's perspective and provides information about the skills, quality, and availability of the labor force.

While considerable information is available surrounding workforce issues at the national level, less information is available at the local and regional levels, resulting in inadequate data to make objective decisions. Moreover, the impact of the Covid-19 pandemic on the global workforce has been significant and renders most previous workforce data obsolete. While employers are concerned about over-employment and workers with deficient skills or are otherwise under-qualified, the workforce and community are concerned about underemployment and workers who have excess skills who are over-qualified for their jobs and present opportunities for expansion and new investments. Although the dynamics of the workplace have changed due to the Covid-19 pandemic, employers will continue to recruit the best employees with the best skills for the best value and workers will continue to seek the best jobs with the best compensation package and work environment. The balance for a competitive workforce is critical with the employer, community, education, and worker all having a major stake in developing a skilled and productive workforce with a goal of a just-in-time skill and talent pool to meet demand.

With increasing workforce challenges for the future anticipated from demographic changes in an aging population, the question of a more active approach to increasing the labor pool with productive workers is crucial. Weighing the cost for education and other programs with the social and economic benefits will be key in remaining competitive in a global economy.

## Appendices

## Appendix A-Wage and Salary Conversion Rates

The following data represents pay rates in four different ways. All wage and salary data collected during this study are presented in this report as hourly rates. Selected conversions may add perspective to the hourly rates. Figures presented below are rounded and based on a 40-hour workweek.

Wage and Salary Conversion Chart			
Hourly	Weekly	Monthly	Annually
\$8	\$320	\$1,387	\$16,640
\$9	\$360	\$1,560	\$18,720
\$10	\$400	\$1,733	\$20,800
\$11	\$440	\$1,907	\$22,880
\$12	\$480	\$2,080	\$24,960
\$13	\$520	\$2,253	\$27,040
\$14	\$560	\$2,427	\$29,120
\$15	\$600	\$2,600	\$31,200
\$16	\$640	\$2,773	\$33,280
\$17	\$680	\$2,947	\$35,360
\$18	\$720	\$3,120	\$37,440
\$19	\$760	\$3,293	\$39,520
\$20	\$800	\$3,467	\$41,600
\$21	\$840	\$3,640	\$43,680
\$22	\$880	\$3,813	\$45,760
\$23	\$920	\$3,987	\$47,840
\$24	\$960	\$4,160	\$49,920
\$25	\$1,000	\$4,333	\$52,000
\$26	\$1,040	\$4,507	\$54,080
\$27	\$1,080	\$4,680	\$56,160
\$28	\$1,120	\$4,853	\$58,240
\$29	\$1,160	\$5,027	\$60,320
\$30	\$1,200	\$5,200	\$62,400
\$31	\$1,240	\$5,373	\$64,480
\$32	\$1,280	\$5,547	\$66,560
\$33	\$1,320	\$5,720	\$68,640
\$34	\$1,360	\$5,893	\$70,720
\$35	\$1,400	\$6,067	\$72,800
\$36	\$1,440	\$6,240	\$74,880
\$37	\$1,480	\$6,413	\$76,960
\$38	\$1,520	\$6,587	\$79,040
\$39	\$1,560	\$6,760	\$81,120
\$40	\$1,600	\$6,933	\$83,200
\$41	\$1,640	\$7,107	\$85,280
\$42	\$1,680	\$7,280	\$87,360



## Appendix B-Methodology

A primary goal of any Area Labor Market (ALM) or labor shed analysis is to estimate the potential availability of workers and determine how well the surrounding geographical areas are able to provide a stable supply of workers to the central focused core of the ALM or labor shed.

A key source of good employees is the category of the underemployed, those individuals who are now working but desire a better job and who possess the skills, education, and experience to qualify for better jobs. Underemployment or underutilization of skills or experience is a significant issue in many communities and is an important element for employers assessing a community for location or expansion. The availability of a highly skilled and experienced labor is among the top three important location factors for businesses considering expansions or relocations (Area Development Annual Surveys).

The key advantage of an Area Labor Market (ALM) analysis is that it expands the pool of potential workers by including workers excluded from the Civilian Labor Force (CLF). It also allows researchers to examine those individual members of the ALM pool who have a propensity to consider a job opportunity given their employment expectations. Employers' evaluating the labor component are also more likely interested in the population age segment 18-64 than in the CLF representing the civilian non-institutional population, 16 years of age and over classified as employed or unemployed. Even with those restrictions, employers should note that, in practice, not all members of the available labor would apply for a new job opportunity. The reader is further cautioned that, while the number of workers identified as available with their skills, experience, education, and costs as accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.

Published government statistics report wages and employment for the entire labor of an area, even though most of that labor has no interest in changing jobs. This report, prepared by Growth Services Group (GSG), includes data on those people in the area who desire to change jobs and who would be potential workers of employers with the right opportunity. Whereas, the BLS reports average wages, this report provides the number of available workers for an employer in various desired wage ranges. It includes the unemployed who are actively looking for work as well as those who would enter the labor under the right conditions or opportunities including homemakers, and retirees.

The labor analysis will start with a focus on a state, community, county, or multi-county area to determine the boundaries for the area to be assessed. It can also decide to quantify those outside the Core willing to change jobs and to commute and work in the central core area.

A random residential survey is conducted within the Area Labor Market (ALM). The survey is designed by Growth Services Group (GSG) and conducted by use of social media targeted marketing. The overall goal of the process is to collect a sufficient number of valid surveys completed by respondents 18 to 64 years of age. Validity of a sufficient number of survey results to a confidence of +/-5 percent is necessary with query or drill down validity of +/-10-15 percent. To ensure that an even distribution of respondents is achieved, a proportional number of completions are conducted by population, age segments, and sex.

The survey is approved by the client, employers, or Economic Development organization and can be customized as needed. Survey questions determine the respondents' sex, age, education level, place of residence, and current employment status. Employed respondents also identify the location of their employer (not name), place of work, employer type by industry, occupation, years of employment in their occupation, employment status, current salary or wage, number of jobs currently held, and distance traveled to work. Employed respondents are then asked how likely they are to change employers or employment, how far they would be willing to travel for employment, the wage desired for them to change employment, and the benefits required for new employment. Underemployment is determined by examining those employees who stated they possessed experience and additional education/skills that are not utilized in their current position.

Respondents in the 18-64 year age range self-identifying themselves as working, unemployed, homemaker, retired, military or student are asked a series of questions to determine what job characteristics and benefits were most important for them when considering employment, the reasons for unemployment, and how far they would be willing to travel to accept employment. Information on previous employers and skills is also gathered for these sectors. The employer type groups employers into three main categories by Goods Producing, Service Providing, and Government/Education. This allows employers evaluating the labor to view occupations from a work culture perspective as well as skills and experience. Once completed, the results of the survey are compiled and queried or cross-tabulated to determine the relationship between the variables of the core central area, the outside surrounding core ALM, and the entire surveyed ALM. Documenting and analyzing the ALM survey results by area and characteristics, provides new insight into the area's available labor that is currently unavailable in any other form.

A final note, prior to data processing, the GSG applies a proprietary process to the analysis of the data to correct for invalid responses. An individual indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable is not counted in the results, as an example. Further the process considers that to be counted as underemployed an individual must be currently employed and willing to take another job at a pay rate commensurate with personal skills, education and experience.

Our propriety data applications allow for state-wide or large multi-county partnerships for cost reductions. Our largest single Labor Availability study consisted of five partners and 27 counties, with each partner receiving its own labor shed breakout report from the same database, making the project more cost effective for all partners. All survey data is retained and available for further analysis on specific areas of interest (pricing may vary). The individual partner report results are proprietary and for your use only and are not shared with other partners. Only the database is common and by a programming application, separate labor shed reports can be developed. The survey questionnaire must be uniform across the entire project area.